

**REQUEST FOR PROPOSALS  
HOUSING PRODUCTION PLAN UPDATE  
2020**

**Responses Due:**

XXXX at 2:00pm  
Late Responses Will Be Rejected

**Deliver Complete Responses To:**

Town Manager  
Town Manager's/Purchasing Dept.  
Town Hall Annex 2<sup>nd</sup> floor  
730 Massachusetts Avenue  
Arlington, MA 02476

**For Further Information Please Contact:**

Jennifer Raitt, 781 316-3092  
Email: [jraitt@town.arlington.ma.us](mailto:jraitt@town.arlington.ma.us)

RFP No. 20 –

**I. OVERVIEW/ PURPOSE**

The Town of Arlington, acting through its Department of Planning & Community Development (hereinafter referred to as DPCD), seeks proposals from consultants to complete an update to the 2016 Housing Production Plan, which will expire in October 2021.<sup>1</sup> Specifically, DPCD seeks the professional services from experienced firms qualified to complete an update consistent with the Massachusetts Department of Housing and Community Development (DHCD) guidelines for the development of a housing production plan (HPP). It is expected that the consultant will work with DPCD and an advisory committee.

This effort is funded through Community Development Block Grant (CDBG) funding for Fiscal Year 2021 for a total of XXX.

**II. BACKGROUND INFORMATION**

Arlington transformed into a streetcar suburb in the early to mid-20<sup>th</sup> Century and is now a densely developed vibrant community. Approximately 85% of the land area in Arlington is zoned residential and the remaining 15% of land is zoned open space, commercial, and industrial. The low density residential districts (R0, R1, and R2) represent the majority of the residentially zoned land. The higher density residential districts, business, and industrial districts are generally along Massachusetts Avenue and Broadway.

The Town is governed by a five-member Select Board and Representative Town Meeting. Daily management is vested in a Town Manager appointed by the Select Board. Planning and development is controlled by Massachusetts General Laws (MGL), the Arlington Town Manager Act, the Town Bylaws, and the Arlington Zoning Bylaw. The Arlington Redevelopment Board (ARB) serves as both a planning board and urban renewal authority under MGL Chapter 40A and 121B, respectively. Four members of

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<sup>1</sup> <https://www.arlingtonma.gov/home/showdocument?id=30611>

the ARB are appointed by the Town Manager with approval of the Select Board and one member is a gubernatorial appointee. The Zoning Board of Appeals is appointed by the Select Board. Both the ARB and the Zoning Board of Appeals act as special permit granting authorities as designated in the Zoning Bylaw. The Director of Inspectional Services serves as the Town's Zoning Enforcement Officer.

### **The Master Plan<sup>2</sup> and Housing Production Plan**

In May 2015, the Arlington Town Meeting voted to endorse the Arlington Master Plan, "Your Town Your Future" with approximately 75% of members voting in favor of the plan. The Master Plan set forth policy goals and strategies for the community. Over the years, the Town has begun to implement many of the plan's recommendations.

The Master Plan noted that the last comprehensive Housing Needs and Strategy Plan was prepared in 2004, and recommended the creation of a HPP. Shortly after the adoption of the Master Plan, the work on a Housing Production Plan got underway, and ultimately approved by DHCD on November 7, 2016. The main themes identified in the 2016 Housing Production Plan are that (1) Arlington is an economically diverse place, (2) housing prices are increasing faster than incomes, (3) housing is older and in need of updating, and (4) there is unmet demand for housing both in terms of number of units, type, and affordability. The goals and strategies focus on these themes.

The Housing Plan Implementation Committee (HPIC) was formed to implement the HPP. There has been mixed success in implementing many of the HPP's actions. While there was success in amending the Zoning Bylaw to allow mixed-use and certain parking reductions, other Zoning Bylaw amendments focused on housing production have not succeeded.<sup>3</sup> Additionally, prior to the significant condensing of the 2020 Annual Town Meeting due to the coronavirus pandemic, the HPIC was focused on the development of warrant articles to establish a municipal affordable housing trust fund and a real estate transfer fee as a funding mechanism for such a trust. There were also a wide variety of citizen petitions relative to housing production submitted. These articles will be reconsidered at a future Town Meeting.

The Town of Arlington also has currently underway a Fair Housing Action Plan, which is expected to be completed in the fall of 2020. The Fair Housing Action Plan includes an Analysis of Impediments to Fair Housing Choice, as currently required by the U.S. Department of Housing and Urban Development. It will also include some elements of an Assessment of Fair Housing, as previously required under the Affirmatively Furthering Fair Housing Final Rule, which was recently rescinded.

### **III. SCOPE OF SERVICES**

The Town of Arlington seeks proposals from qualified organizations to assist in the update to the existing HPP consistent with the Massachusetts Department of Housing and Community Development (DHCD) guidelines.

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<sup>2</sup> <https://www.arlingtonma.gov/departments/planning-community-development/master-plan>

<sup>3</sup> See Town Meeting documents on mixed-use amendments and parking reductions in 2017, and various zoning amendments relative to housing production in 2019: <https://www.arlingtonma.gov/town-governance/town-meeting>. Information on the 2020 Annual Town Meeting articles that were postponed is available from DPCD.

### **Housing Production Plan Update**

The HPP update may include a combination of narrative, diagrams, maps, data tables, along with other visual forms of communication to effectively convey concepts and data necessary to inform stakeholders. At a minimum, the following components will be included in the plan:

1. A comprehensive housing needs and demand assessment based on current census data, population trends, labor and workforce trends, and regional growth factors to determine future population and housing needs for a range of income levels. Analysis should, at a minimum, include the following elements:
  - a. Most recent available census data of Arlington's demographics;
  - b. Housing Stock, including Census data, current M.G.L. Chapter 40B Subsidized Housing Inventory, Building Permits, and any other recently created housing studies;
  - c. Housing affordability across a range of household incomes; and
  - d. Real estate trends and supply/demand analysis.
2. An analysis of regulatory and non-regulatory constraints on the development of affordable housing, and plans to mitigate identified constraints.
3. Housing vision and goals that consider a mixture of housing types available to a range of income levels. The goals will also address fair housing requirements and accommodation for residents with special needs.
4. Strategies for achieving goals and an implementation plan.

### **Public Meetings and Community Outreach**

The planning process will include community outreach and input to inform the needs analysis and develop the overarching vision and goals. A core objective of the HHP is to build a public process that serves the dual purpose of informing the public of the Town's housing needs and how its housing policy is responsive to those needs, and secondly, build a strong constituency supportive of creating new housing. At a minimum, we expect to hold two public forums that are designed by the Consultant and DPCD Staff but are conducted by the DPCD staff.

### **Staff Role**

Town of Arlington staff, primarily from DPCD, will be closely involved, but the Consultant is expected to devote the time needed to conduct research, write documents, and participate in up to 3 meetings with the advisory committee. The staff will present information prepared by the Consultant at public forums without the Consultant's attendance. Additionally, staff will take primary responsibility for scheduling meetings, posting notices for meetings, preparing meeting minutes, and attending all meetings. Staff will provide any reasonably necessary baseline data, the Zoning Map, the Master Plan, the General and Zoning Bylaws, and any other relevant materials in electronic format.<sup>4</sup>

## **IV. PROJECT SCHEDULE**

Work is expected to start in the fall of 2020. The goal is to have the Arlington Redevelopment Board and the Arlington Select Board adopt an updated Housing Production Plan in June 2021. The Consultant shall prepare a reasonable timeline to complete the project.

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<sup>4</sup> Some older information may only be available in a hard copy format.

## V. DELIVERABLES

The Consultant will deliver two (2) copies of all reports produced, along with high-quality electronic copies of the same in a Microsoft Word compatible version and a searchable PDF version. All materials will become the property of the Town of Arlington.

## VI. CONSULTANT QUALIFICATIONS

At a minimum, the proposing firm/team must meet the following requirements:

1. The firm/project manager/team must have at least five (5) years of experience in preparing housing production plans or other comprehensive housing plans and community engagement on projects of similar size and scope.
2. The principal and project manager to be assigned to this project must be available for meetings with the Town on days or evenings, as required.
3. The firm/team must have previous experience in similar projects. Successful completion of a minimum of three (3) such projects within the last five (5) years is required, and completion of five (5) overall is desired.
4. The firm/team must have proven experience in the public and/or private sector and in working with federal, state and municipal agencies, and neighborhood/business organizations.
5. The volume of the proposed project managers and firm's current and projected workload must not adversely affect its ability to immediately initiate work and to follow through with the project in a timely and professional manner. The firm and all team members must be current staff members and capable of devoting a significant amount of time to this project in order to complete the work within the schedule outlined in this RFP.

## VII. SELECTION CRITERIA

The Town will award the contract to the Consultant offering the most advantageous response to this RFP, taking into consideration all evaluation criteria. The selection process will include an evaluation procedure based on the criteria identified below. Finalists may be required to appear for an interview.

1. Staffing Plan, including the professional qualifications of all project personnel with particular attention to training, educational background, professional certification or registration, and professional experience. Demonstrated expertise and experience of the Principal-in-Charge, Project Manager, and other key personnel, and any Consultants to be assigned to the Project, including professional registration of the Consultants and their qualifications. The Plan of Services should be detailed and logical, and demonstrate efficiencies and creativity in completing the project.

**Highly Advantageous:** The plan of services proposes a detailed, logical, creative, collaborative, and highly efficient scheme for producing a complete project that addresses all Goals and Priorities of this project and meets all the minimum applicant qualifications detailed in Section VI, "Consultant Qualifications".

**Advantageous:** The plan of services proposes a credible scheme for producing a complete project that addresses all of the required issues and meets all the minimum applicant qualifications detailed in Section VI, "Consultant Qualifications".

**Not Advantageous:** The plan of services is not sufficiently detailed to fully evaluate, or the plan does not contain all the components necessary to produce a complete project that addresses all of the required issues and meets all the minimum applicant qualifications detailed in Section VI, “Consultant Qualifications”.

**Unacceptable:** The plan of services does not meet all the minimum applicant qualifications detailed in Section VI, “Consultant Qualifications”.

2. Depth of experience with similar projects in municipal planning or private sector planning, housing planning, and community engagement, and prior experience with relevant general and zoning bylaws.

**Highly Advantageous:** The Consultant has at least seven (7) years of experience consulting with municipalities or private clients on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of five (5) similar projects within the last five (5) years.

**Advantageous:** The Consultant has at least five (5) years of experience consulting with municipalities or private clients on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of three (3) similar projects within the last five (5) years.

**Not Advantageous:** The Consultant has less than four (4) years of experience but more than one (1) year consulting with municipalities or private clients on projects of similar size and scope to this project. The Consultant can demonstrate the successful completion of two (2) similar projects within the last five (5) years.

**Unacceptable:** The Consultant has less than four (4) years of experience consulting with municipalities or private clients on projects of similar size and scope to this project. The Consultant cannot demonstrate the successful completion of similar projects.

3. Responsiveness of proposal, including a demonstrated understanding of all project components, creativity in addressing housing topics, and public outreach needs.

**Highly Advantageous:** The response contains a clear, creative, and comprehensive plan that addresses all project Goals and Priorities as stated in the RFP.

**Advantageous:** The response contains a clear plan that addresses most of the project Goals and Priorities as stated in the RFP.

**Not Advantageous:** The response does not contain a clear plan to address many of the project Goals and Priorities as stated in the RFP.

**Unacceptable:** The response does not contain any plan to address the project objectives stated in the RFP.

4. Strength and credibility of client references. The Consultant shall demonstrate prior client satisfaction with working relationship, project management capabilities, and technical

expertise in developing similar projects.

**Highly Advantageous:** More than three clients who consider your services satisfactory or better. Projects were completed within budget and on schedule with minimal, insignificant delays.

**Advantageous:** Three clients who consider your services satisfactory or better. One of the Consultant's references indicates that the project was not completed within budget attributable to the Consultant or with substantial delays attributable to the Consultant, and no current project or project completed in the last three years experienced substantial delays attributable to the Consultant.

**Not Advantageous:** Three or more clients not all of whom consider your services satisfactory or better. Two of the Consultant's references indicate that the project was not completed within budget attributable to the Consultant or was completed with substantial delays attributable to the Consultant, and no current project or project completed in the last year experienced substantial delays attributable to the Consultant.

**Unacceptable:** Fewer than three clients who consider your services satisfactory or better, or three or more clients who consider your services unsatisfactory. More than two of the Consultant's references indicate that the project was not completed within budget attributable to the Consultant or was completed with substantial delays attributable to the Consultant.

## VIII. SUBMITTAL REQUIREMENTS

Interested qualified firms must submit its response addressing the objectives, scope and schedule described in this RFP. Responses must include, at a minimum, each of the following:

- Three (3) paper copies of the technical proposal and a USB drive with the technical proposal in searchable PDF format shall be submitted in a sealed envelope marked “RFP#20- Housing Production Plan Update - Technical Proposal”.
  1. General description of the firm/team's experience.
  2. Description, with examples, of the firm/team's experience in working with municipalities or private clients to successfully implement zoning amendments.
  3. A detailed scope of services for the proposed work, including the firm/team's general approach to such work, evidence of the firm/team's understanding of the goals and objectives of the project, and methodology for accomplishing the tasks as listed in this RFP.
  4. An outline of the schedule for completion of tasks (timeline) as presented in the firm/team's approach to the scope of services.
  5. Description of or resumes for the assigned staffs' experience, educational background, availability, and chain of responsibility, including the name and title of the principal and project manager assigned to the project, names of all sub-consultants, and resumes of all personnel to be associated with the project.
  6. At least three (3) references, including name, title, agency, address, description of project, project cost, and telephone number and the email address for clients with

- similar projects completed by the Consultant within the last five years (including dates).
7. Other pertinent information about the firm(s) that would aid the Town in making a selection.
  8. Completed Required Forms.
  9. Evidence of insurance coverage, including general and professional liability and Workers' Compensation insurance.
- Sealed Submission, one (1) copy, clearly marked "RFP #20- Housing Production Plan Update - Price Proposal".
    1. Completed Price Proposal Form (attached)
    2. Estimated breakdown by task of professional service fees (including expenses), assigned project staff and hourly billing rates of all staff assigned to provide services (including any sub-consultants).

Proposals must clearly address all the submittal requirements; that is, the response should include a section addressing all of the minimum qualifications, the minimum submittal requirements, and each of the review criteria. The proposal will be reviewed based on each of these items and it will be to the benefit of the responder to clearly address each of the items. Where the requirements specify a minimum level of experience, indicate the dates of said experience.

A Selection Committee will be convened to review proposals. Committee members will be drawn from Town staff, ARB members, HPIC members, and may include other community members.

The Town reserves the right to reject any or all proposals, to waive any non-material irregularities or information in any RFP, and to accept or reject any item or combination of items. The Town also reserves the right to seek additional information and revised proposals prior to selection of a Consultant through written notice to all of the respondents.

A Project Briefing Session to address Consultants' questions and provide access to relevant Town plans and studies will be held virtually on XXX, 2020 at 1:00 p.m. To confirm your attendance at the project briefing session, please contact Jennifer Raitt at 781 316-3092 or by email at [jraitt@town.arlington.ma.us](mailto:jraitt@town.arlington.ma.us). Questions and/or comments may be submitted to Jennifer Raitt, Director of Planning and Community Development at [jraitt@town.arlington.ma.us](mailto:jraitt@town.arlington.ma.us) / 781 316-3092 by xx.

Responses to the RFP are due by 2 PM on X. Facsimile and/or emailed responses will not be accepted. All responses should be submitted to:

Adam W. Chapdelaine  
Town Manager  
Town of Arlington  
730 Massachusetts Avenue  
Arlington, MA 02476

Any interviews with prospective consultants will be scheduled in XXX 2020.

## **IX. PROJECT FUNDING**

Consultants must complete the attached Price Proposal Form under separate cover. Project fees must be provided for each Project Component of work as described in the Scope of Services. Fees shown will include all costs and expenses (copying, mileage, photographs, maps, etc.) to complete the Scope of Services defined in this RFP. Also, the selected Consultant will be required to submit invoices identifying hours, expenses and total cost by specific tasks. The final contract scope, price and fee will be negotiated with the highest ranked responder.

## **X. REQUIRED FORMS**

All required forms must be submitted with the proposal.

- A. Certificate of Non-Collusion
- B. Certificate of Tax Compliance
- C. Price Proposal Form



**CERTIFICATE OF NON-COLLUSION FORM**  
**TOWN OF ARLINGTON**  
**HOUSING PRODUCTION PLAN UPDATE**

The undersigned certifies under penalties of perjury that this bid or proposal has been made and submitted in good faith and without collusion or fraud with any other person. As used in this certification the word "person" shall mean any natural person, business, partnership, corporation, union, committee, club, or other organization, entity, or group of individuals.

\_\_\_\_\_  
Signature of Individual Submitting Bid or Proposal

\_\_\_\_\_  
Name of Individual Submitting Bid or Proposal

\_\_\_\_\_  
Name of Business

\_\_\_\_\_  
Date

BY STATE LAW THIS NON-COLLUSION FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

**CERTIFICATE OF TAX COMPLIANCE FORM**  
**TOWN OF ARLINGTON**  
**HOUSING PRODUCTION PLAN UPDATE**

Pursuant to MGL Chapter 62C, Section 49A, I certify under the penalties of perjury that I have complied with all laws of the Commonwealth of Massachusetts relating to taxes, reporting of employees and contractors, and withholding and remitting child support.

\_\_\_\_\_  
Social Security Number or  
Federal Identification Number

\_\_\_\_\_  
Signature and Title of Individual or  
Responsible Corporate Officer

BY STATE LAW THIS CERTIFICATE OF TAX COMPLIANCE FORM MUST BE SIGNED AND SUBMITTED WITH THE BID OR PROPOSAL.

**PRICE PROPOSAL FORM**  
**(To be place in a separate sealed envelope)**

**RFP #20-\_\_ Consultant Services**

**TOWN OF ARLINGTON**  
**HOUSING PRODUCTION PLAN UPDATE**  
**Arlington, MA 02476**

CONTRACTOR      Town Manager  
                         Town of Arlington  
                         730 Massachusetts Avenue  
                         Arlington, MA 02476

PROPOSER

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PROJECT:            Consultant Services for an Economic Analysis of Industrial Zoning Districts

Proposed Price (in words): \_\_\_\_\_

Proposed Price (in numbers): \$ \_\_\_\_\_

Please attach estimated budget and breakdown by planning element of professional service fees, assigned project staff and hourly billing rates of staff.

\_\_\_\_\_  
Signed

\_\_\_\_\_  
Title

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date Signed